

## Steps in the Referral Process

1. The referral creator (in this case hayley1) makes referrals and submits them to the referral center.
2. The referral center manager (hayley2 in this case, a referral worker at Mid-Valley) would take the referral "unassigned in administrative review" and assign it to a referral center worker (in this case to the same account);
3. After the referral is assigned the referral center worker the referral can be found in "assigned in administrative review". The referral worker (in this case hayley2) then processes the referral (either cancels it or denies it or requests more information or clicks "clinical review" to send the referral onto clinical review).
4. The clinical reviewer (hayley3) is the physician who decides if the referral is clinically appropriate and where the patient should be assigned to, finds the referral in the section "unassigned in clinical review" and then assigns it to a clinical reviewer (in this case the only option is hayley3--who would for example be a physician at Mid-Valley who reviews all the dental referrals).
5. The referral is then "assigned in clinical review" hayley3 who then either approves, denies or requests additional information. If the clinical reviewer approves the referral for an appointment they specify the timeframe the appointment is to be made in.
6. After the referral is approved for appointment it goes back to the referral center manager (hayley2) who finds it under the tab "appointments", the link is "Approved Referrals for Appointment", the referral center manager reviews the information and then clicks "make appointment", and assigns the patient and date and time for the appointment, and then clicks the button "make appointment", a screen comes up indicating that the appointment has been made and the referral worker has the option of printing a letter to be sent to the patient letting them know the appointment has been made. To generate the letter just click "print letter" the system requests the room number and then generates the appointment letter (which is in English and Spanish).
7. After the patient has been seen, the referral center worker (hayley2) will open up the referral again, attach any progress reports from the clinician who treated the patient and identify the referral as "Kept - progress report sent".
8. Then the referral initiator "hayley1" can log back in and check on the referral and open up the progress report attached to the referral to see the results of the patient's visit.

Hayley5 in this example is the site administrator at the PPP who can alter the sites associated with the PPP and change the users and alter the roles for the staff members at their PPPs .

Hayley4 (reports site) is the role for a PPP administrator or worker who wants to track the productivity of their sites. For the PPP click on the tab "operating reports", the link "reports", select the drop down menu option "referral processing detail report", report span type "service provider", report span data "Mission City Community Network", site facility [select one of your sites], select the date and how you want the data to be grouped by.

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